How To Create your own dealfunnel snapshots

1. Resources

- Report on Historical Data with Reporting Snapshots
 <u>https://help.salesforce.com/s/articleView?id=sf.data_about_analytic_snap.htm&type=5</u>
- Dashboard Dōjō Hands-on Salesforce Reporting Snapshots https://www.youtube.com/watch?v=GbrWuhX_X0
- How to create Reporting Snapshot in Salesforce | Salesforce tutorials <u>https://www.youtube.com/watch?v=lpdvRo4Ga8w</u>

2. Basic steps

a. Create a source report

Enable Field Editing Q, 4% Add Chart Y C' Edit V									
Tot 17	al Records Total Estimated Investment Size EUR 59,694,000.00								
	Investment Opportunity: Investment Opportunity Name	Account: Account Name 💌	Start Date 💌	Status 💌	Opportunity Source	Estimated Investment Size	Lead rating	Investment Opportunity: Owner Name	
1	VL Test IO	VL Test Account	6/2/2023	1. New	Corporate finance advisor	×	**	Admin Venturelytic	
2	Adidas Seed	Adidas	1/3/2023	2. Hot	Corporate finance advisor	EUR 5,000,000.00	****	Martin Mainz	
3	Basic Fit Series A	Basic Fit	1/31/2023	3. Bid	Event	EUR 5,000,000.00	*****	Martin Mainz	
4	Twitter Series C	Twitter	1/17/2023	2. Hot	Incubator	EUR 600,000.00	****	Mathijs Heutinck	
5	Pfizer Seed	Pfizer	11/28/2022	4. LOI	External	EUR 500,000.00	****	Admin Venturelytic	

b. Create custom target object

	portunity Snapshot					
Details	Fields & Relationships 11 Items, Sorted by Field Label		Q, Quick Find	New Deleted Fields Field De	ependencies Set Histor	ry Trackin
Fields & Relationships	FIELD LABEL	* FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Page Layouts	Account Name	Account_Namec	Text(255)			
Lightning Record Pages	tring Record Pages Created By Created By CreatedById		Lookup(User)			
Buttons, Links, and Actions	Currency	CurrencylsoCode	Picklist			*
Compact Layouts	carrenty	currentysocosa	FICKIN			
Field Sets	Estimated Investment Size	Estimated_Investment_Sizec	Currency(18, 0)			*
Object Limits	Investment Opportunity Name	Investment_Opportunity_Namec	Text(255)			*
Record Types	Investment Opportunity Owner	Investment_Opportunity_Ownerc	Text(255)			
Related Lookup Filters			00000004			
Restriction Rules	Investment Opportunity Snapshot Name	Name	Auto Number		~	*
Triggers	Last Modified By	LastModifiedById	Lookup(User)			
Flow Triggers	Owner	OwnerId	Lookup(User,Group)		~	



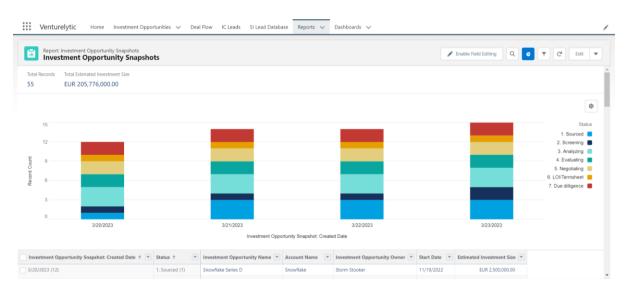
c. Setup a reporting snapshot (Setup>Reporting Snapshot)

Q. Quick Find	SETUP				
etup Home	Reporting Snapsho	ots			
	eporting Snapshots				Help for this Page 🤢
lulti-Factor Authentication Assistant	nvestment Opportunity S	napshot			
elease Updates *	3860 (196)	5 C			
ghtning Experience Transition	Identification	Edit Delete			
htning Experience Transition sistant		Edit Delete	Next Run	6/6/2023, 7:00 PM	
ghtning Experience Transition sistant lesforce Mobile App			Next Ron Last Ron	6/6/2023, 7:00 PM 6/6/2023, 7:06 PM	
phning Experience Transition sistant lesforce Mobile App	Reporting Snapshot Name	Investment Opportunity Snapshot			
elease Updates s ghtning Experience Transition ssistant alesforce Mobile App ghtning Usage ptimizer	Reporting Snapshot Name Reporting Snapshot Unique Name	Investment Opportunity Snapshot	Last Run	6/5/2023, 7:06 PM	

d. Map the fields from the Source Report with the Target object

Setup Home Object Manager V										
Q. Quick Find	shots									
Setup Home										
Service Setup Assistant Edit Reporting Snapshot Help Set this Page 🔴										
Multi-Factor Authentication Assistant Investment Opportunity Snapshot										
Release Updates Edit Reporting Snapshot Field Mappings Save Quick Save Cancel										
Lightning Experience Transition Assistant										
Salesforce Mobile App Select the fields on the source report that you want to map to the target object. You can assign the same source report field to more than one target object field.										
Lightning Usage										
Optimizer										
> Users										
> Data	Fields from Source Report	Map to	Fields in Target Object							
> Email Dealfu	unnel Snapshot Source Report		Investment Opportunity Snapshot							
PLATFORM TOOLS Account: Account	Name 🗸		Account Name (Text(255))							
> Apps (No fields with compat	tible data type)	-	Clone Source (Lookup())							
	Estimated Investment Size Estimated Investment Size (Currency(18, 0)) Investment Opportunity Investment Opportunity Name Investment Opportunity Name (Text)250)									
	rtunity: Owner Name		Investment Opportunity Owner (Text(255))							
Reports & Dashboards (No fields with compating)	tible data type)		Object Access Level (Lookup(User Record Access))							

e. Create a new report based on your target object



Additional questions? Reach out to support@venturelytic.com to setup snapshots of your funnel.

Grow along with your investments